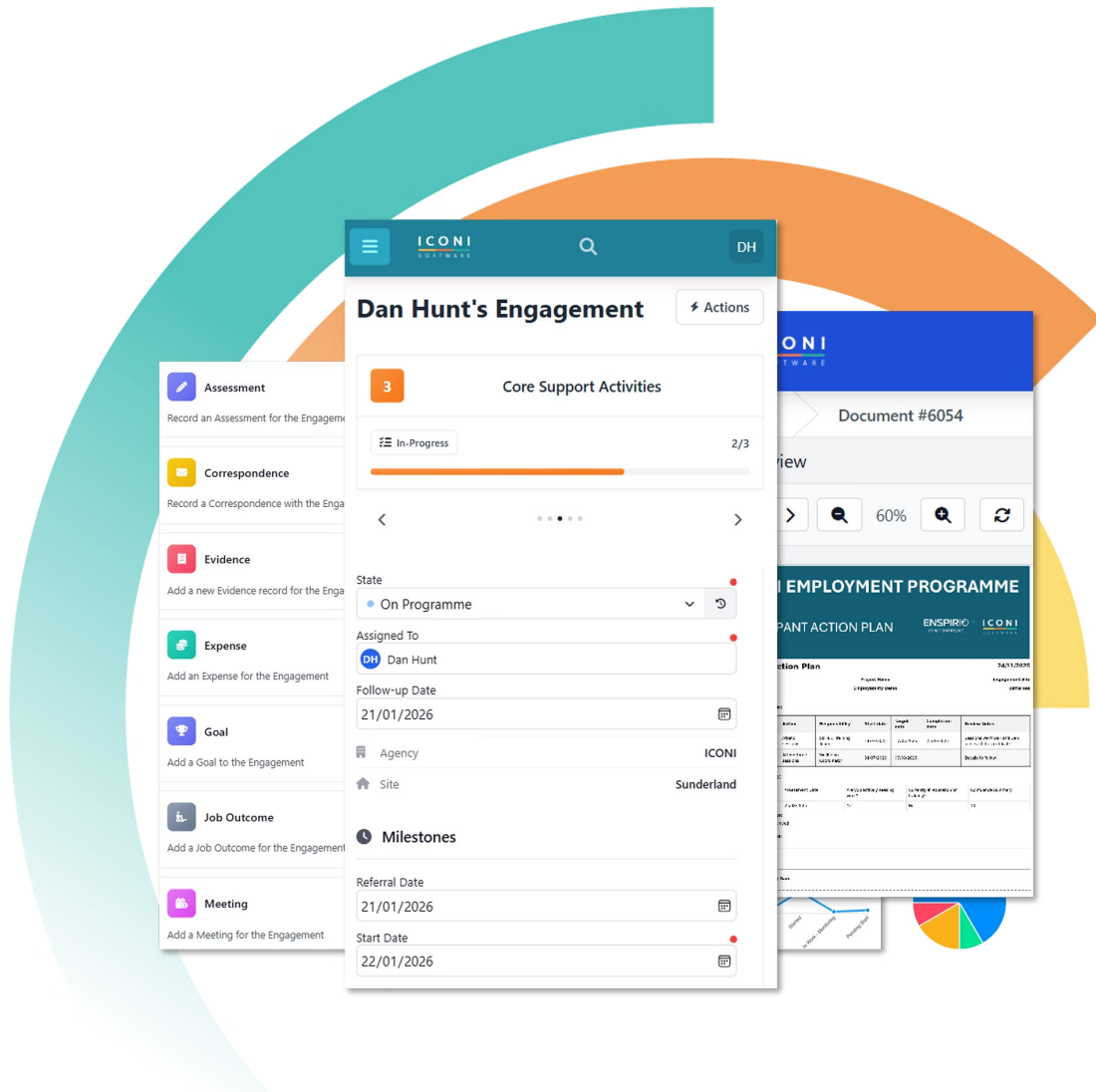


Service Definition Document

ENSPIRIO – Effortless Case Management for Maximum Impact



ENSPIRIO
enrich and inspire

by

ICONI
SOFTWARE

About ICONI

ICONI delivers large scale client and programme management information systems to organisations in sectors such as Employability, Skills & Learning, Rehabilitation & Justice, Health & Wellbeing and Economic & Social Development, across the UK and Ireland. Enspirio is a secure, web-based platform that improves efficiency and maximises performance by enabling organisations to fully manage, track and report on all aspects of a client/learner's support.

Enspirio can effectively manage a variety of contracts, programmes, or courses across multiple funding streams and is renowned for it's high quality, ease of use and quick deployment. Enspirio adds strength to contract bids, securely integrates with third party systems and supports all levels of supply chain delivery.

"To revolutionise the supporting role of technology in any organisation that enriches people's lives"

Our team has the right mix of expertise in terms of subject matter, programme knowledge and systems technology to help your organisation achieve optimal outcomes, ensure compliance and accelerate performance.

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ICONI Software Ltd

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6-9 Donegall Square South, Belfast BT1 5JA

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ICONI is accredited in ISO9001 and ISO27001 Quality and Information Security and we are a Microsoft Indirect Cloud Solutions Partner.



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1. Enspiro Service Description

ICONI Software specialises in support programme delivery and case management software. If you assist individuals in sectors such as Employment, Health & Wellbeing, Skills & Learning, Enterprise Development, or Rehabilitation then our Enspiro platform will help you, help them. Our expertise deliver direct value to organisations providing support programmes or courses.

Our Enspiro platform helps organisations:

- Ensure compliance when delivering support programmes
- Optimise programme outcomes
- Accelerate performance across their delivery teams
- Manage their supply chain
- Report on Key Performance Indicators (KPIs)

The Enspiro platform can meet both the operational and reporting needs of any support programme. It is Multi-Programme in its design, which enables organisations to manage multiple programmes or contracts within the same solution.

1.1. Enspiro Features

Enspiro is continually expanding its core features, many of which can be self-configured to match your exact requirements:



Participant / Client / Learner Management

Manage participant background information and referral details



Engagement Tracking

Visually track progression through all stages of the support journey



Smart Notifications

Automatically inform users of outstanding tasks and deadlines



Meeting Management

Plan and record support meetings to review progress



Goal Setting

Track what participants want to achieve during their journey



Assessments

Configure a suite of assessments to identify support needs



Barrier Identification

Record and prioritise issues impacting participants



Support Interventions

Deliver priority support at the right time for participants



Document Generation

Generate documents with configurable branded templates pulling live data



Electronic Signatures

Capture legally binding electronic signatures on documents and forms



Programme Builder

Self-configure programmes without technical expertise, stand up new programmes in days.



Import Builder

Configure and automate data imports from external systems and files



Full API Suite

Comprehensive REST APIs for seamless integration with external systems and custom applications



Outcomes Tracking

Record job and progression outcomes alongside evidence



Vacancy Management

Record vacancies, match against participants and track progress



Participant Portal

Give participants access to resources, programme details, appointments and tasks



Expense Tracking

Log participant expenditure including travel-related costs



Organisation Management

Manage external organisations such as employers and track progress at organisation level



Communications Hub

Regularly communicate with participants using email and SMS



Reporting & Dashboards

Configurable dashboard reporting plus custom export capabilities



Smart Lists

Quickly access and filter information via lists of all key entities

1.2. Enspirio Key Benefits

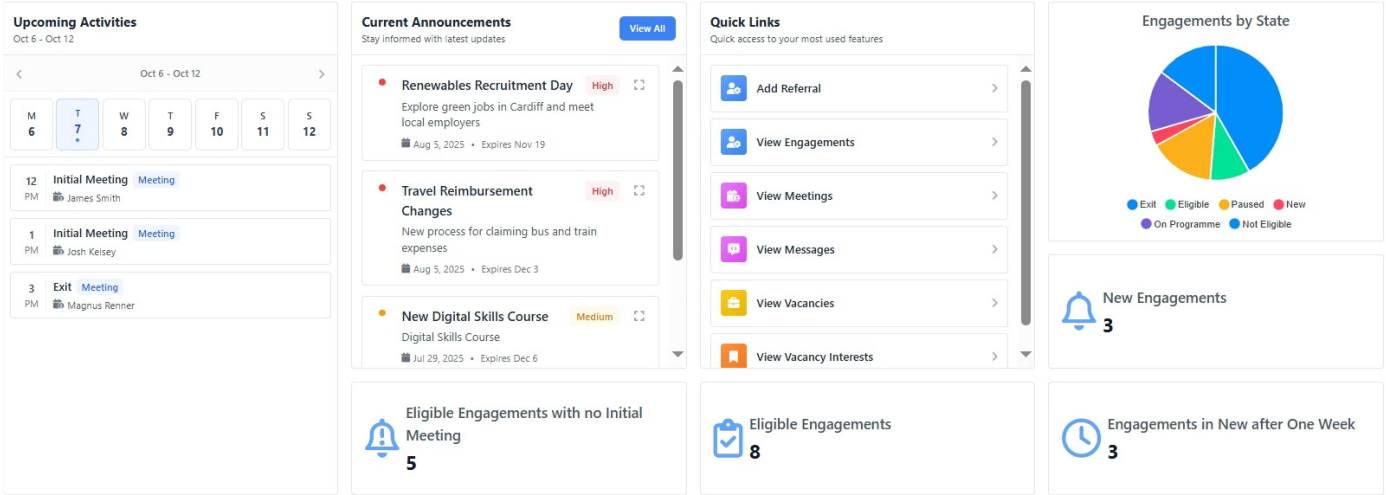
Benefit	Description
Sector-Specific Expertise	With over 24 years' experience in delivering solutions within support sectors, we have a wealth of experience, which adds value to support programme delivery.
Data Security	ICONI is an ISO27001 accredited company and our solutions and platform were designed within this data security environment.
Configuration Speed	Configure programmes quickly and consistently through an intuitive UI, reducing setup effort and accelerating time to value.
Multi-Programme Platform	Being Multi-Programme, our platform is future proof, as new programmes can be added to the same platform utilising already existing features.
Configurable Features	Tailor workflows, fields, and reporting to specific requirements - supporting best practice and reducing the cost of adding new programmes.
Supply Chain Ready	Easily manage all delivery partners across multiple locations.
Utilising the Latest Technology	Hosted on Microsoft Azure Cloud, we use the latest Internet technologies to provide a future-proof and secure managed service platform.
Deliver Optimal Outcomes	Accessing the information your staff need to deliver priority support to participants and help them achieve positive, life changing outcomes.
Visualised Progress	Operational delivery processes are visualised in stages, which helps drive consistency and service levels across the organisation.
Compliance	Business rules are embedded within workflows, ensuring users remain compliant in all stages of support.

Accelerate Performance	Instant information of a participant's progress alerts users to offer priority support interventions, helping accelerate programme delivery and performance across teams of advisors.
Real-time Reporting Tools	The platform includes a suite of reporting tools to enable users to quickly and easily report on all data collated including a user-defined data export report.
User Licensing	Each user licence is for the platform, so a single user license covers access for all programmes or contracts within a solution.
Single View of a Participant/Client/Learner	Participants can be engaged on multiple programmes, which can provide a single view of the full history of support that a participant has received.
Accessible Portal	Participant portal that provides a self-service offering to support participants on multiple programmes.

1.3. Enspirio User Interface

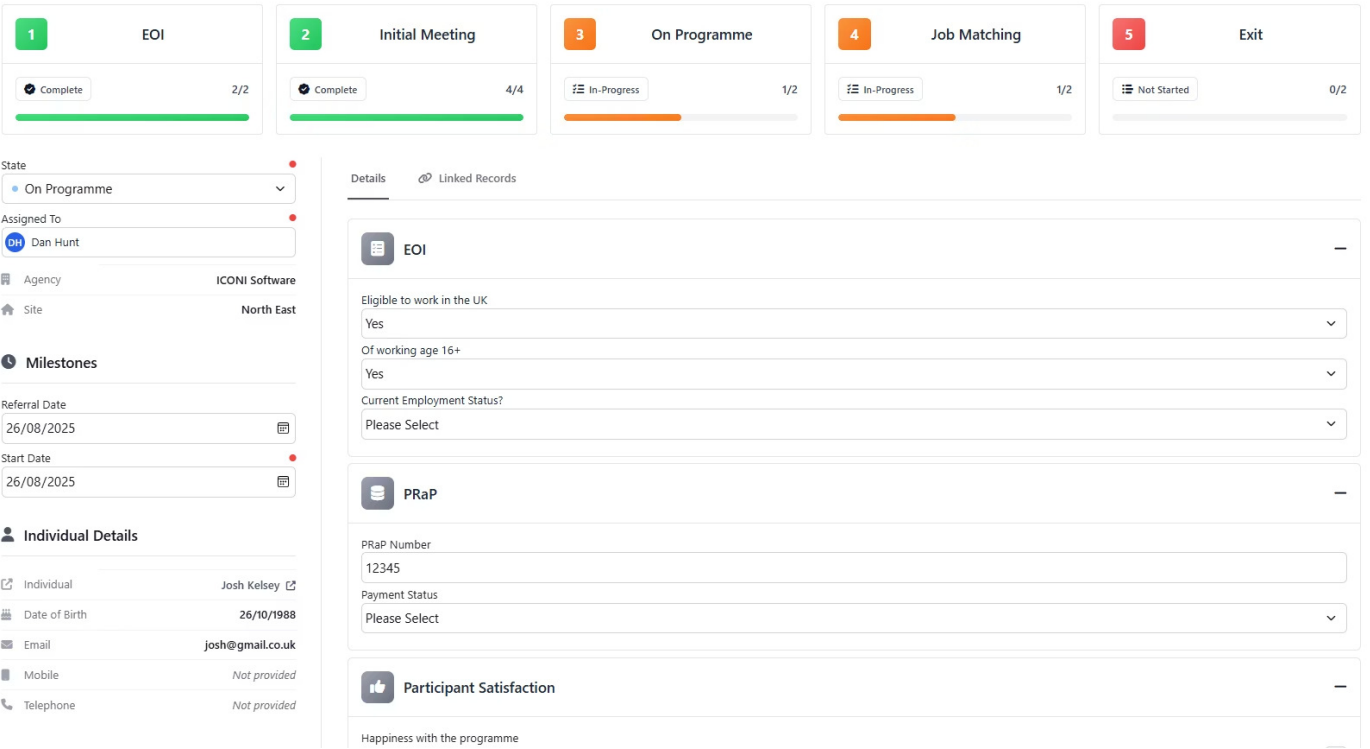
The ICONI Enspirio platform has an accessible and responsive user interface, a dashboard example is shown below:

Advisor Home



The operational stages of new programmes can be self-configured into the solution, for example for a generic Employability programme there might be 5 key stages: from EOI through to Exit:

Josh Kelsey's Engagement



2. Onboarding & Offboarding

ICONI provides onboarding services, with optional consultancy available, and Enspirio includes built-in offboarding functionality.

2.1. Implementation (Onboarding)

An ICONI Account Manager will be assigned to the project and the key onboarding stages are delivered as part of the Consultancy Phase (included in the price but is chargeable if project does not proceed).

A. Organisation and Administrative Setup

- Stand up of Customer Enspirio Tenant
- Access provided to main Administrative User(s)

B. Enspirio Overview:

- Online overview of Enspirio
- Walkthrough demo of Enspirio User Interface and main features including support journey and reporting
- Review of Enspirio support channels and main contacts

Further Consultancy can be provided for additional services including Train-the-Trainer user training and support with programme delivery design and configuration on Enspirio.

2.2. Termination (Offboarding)

Customers must provide 3 months' notice of termination:

A. An exit plan will be agreed.

B. Customer data can be extracted by the Customer via the Enspirio APIs or in-built Enspirio export tools.

C. After termination and transfer of data, all Customer data will be deleted in line with data protection legislation.

3. Service Management

The Ensprero platform is provided via Microsoft Azure Cloud on a secure, managed service platform as detailed below.

3.1. Standard Azure Infrastructure

The Ensprero platform will have the following standard setup and be capable of supporting up to the required concurrent users (minimum of 20 users) with a 99.9% uptime.

- UK-based Azure Datacentre
- Azure Application Service
- Azure SQL Server Database
- Web Application Firewall
- Standard Backup Services
- Storage for related uploaded files

3.2. Maintenance & Support

ICONI will provide first level support for the solution via our Helpdesk, available from 09:00 to 17:00 Monday to Friday (excluding bank/public holidays). Our Helpdesk follows ITIL best practices for Service Level Support. The solution also includes a direct interface to the ICONI Helpdesk for submitting support tickets and tickets can be submitted 24x7. Standard support response times are as follows:

RESPONSE	CATEGORY
1 hours	Critical faults rendering the Software inoperable e.g. service down
4 Hours	Serious faults where any function/section of the application is inoperable or any major functionality is impaired
8 Hours	Minor faults with updates to the application being required or minor functionality impaired

Updates to the Ensprero platform will be managed by ICONI and linked to the Ensprero Product Roadmap. ICONI's standard service does not include service credits for failure to meet the standard service levels. However, we can provide service credits options at additional cost.

3.3. Data Extraction

Customer data can be extracted by the Customer via the Enspiro APIs or in-built Enspiro Reporting tools.

3.4. API Limits

Enterprise user licences are limited to 40 API calls per day, and Pro user licences are limited to 20 API calls per day. These limits apply only to API calls that make system changes (e.g., creating, updating, or deleting records). Read-only API calls (such as data retrieval) are not subject to these limits.

ICONI reserves the right to modify API limits as needed to ensure system performance and will provide notice where feasible.

4. Information Security

ICONI Software is involved in the design, implementation and support of a range of software solutions and as such it is the policy of ICONI to provide the highest possible quality of services to all our clients in accordance with the requirements of our ISO9001 and ISO27001 accreditations.

Our infrastructure environment and the solution are fully secure and we are committed to ensuring that information security is given the highest possible degree of importance. Information is central to our business and it is our aim to ensure that the confidentiality, integrity and availability of this information is protected at all times.

5. Consultancy

ICONI offers a consultancy service:

- Consultant's Working Day: 7 hours exclusive of travel and lunch
- Working Week: Monday to Friday excluding national holidays
- Office Hours: 09:00 – 17:00 Monday to Friday

Consultancy excludes the cost of reasonable hotel, subsistence, travelling and any other ancillary expenses necessarily incurred in connection with the provision of services. Professional Indemnity Insurance is included.

6. Ordering & Invoicing

New customers will complete an ICONI Customer Order Form detailing:

- Customer contact details
- Name of the proposed tier
- Number of named users required

ICONI will confirm the order including a detailed breakdown of all associated costs. Customer must confirm acceptance of the order under the Terms & Conditions and provide any associated Purchase Order Number. Customers will be invoiced for services yearly in advance. All costs quoted are subject to contract and exclude VAT.

7. ICONI Contact Details

ICONI personnel are highly skilled in all aspects of the software development lifecycle and our focus is on delivering effective business-oriented, fully supported solutions. This approach ensures best value for money and maximises the return on investment over the project duration.

Company Name:	ICONI Software Ltd
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Telephone Number:	028 9031 9300
Email Contact:	solutions@iconi.co.uk